



Advantage![®]
www.gsaadvantage.gov



Innovation Partners, LLC

**General Services Administration
Federal Acquisition Service
Mission Oriented Business Integrated Services
Authorized Federal Acquisition Schedule Price List**

On-line access to contract ordering information terms and conditions, up-to-date pricing, and the option to create an electronic delivery order is available through GSA Advantage![™], a menu-driven database system. The Internet address for GSA Advantage![™] is GSAAdvantage.gov

FSC Group: 874 NAICS: 541611-PSC: R499, NAICS: 641611-PSC: R499, NAICS: 611430- PSC: U006,
NAICS: 641611- PSC: U006

GSA Contract Number: GS-02F-0110X

For more information on ordering from Federal Supply Schedules click on the FSS Schedules button at fss.gsa.gov.

Contract Period: March 24, 2011 through March 23, 2016

Innovation Partners LLC
2423 Plantation Center Drive,
Suite A
Matthews, NC 28105

Mailing Address:
P.O. Box 1300
Matthews, NC 28106

Contact Information:

Patrick Sutherland, Phone: 704-708-5461 x.302 Fax: 704-708-5492
www.innovationpartnersllc.com

REQUEST FOR QUOTES (RFQs)

(Please copy all contacts listed below)

Yanique Lawrence ylawrence@innovationpartnersllc.com
Phillip Augustus paugustus@innovationpartnersllc.com

Business Size: Small business. Women-owned business.

TABLE OF CONTENTS

TABLE OF CONTENTS	2
GENERAL CONTRACT INFORMATION	3
INNOVATION PARTNERS, LLC OVERVIEW	5
CONTRACT USE.....	5
CONTRACT SCOPE	6
SPECIAL ITEM NUMBER (SIN) DESCRIPTIONS.....	6
SIN 874-1: CONSULTING SERVICES.....	6
SIN 874-3: SURVEY SERVICES	6
SIN 874-4 TRAINING SERVICES: INSTRUCTOR-LED TRAINING, WEB-BASED TRAINING, EDUCATIONAL COURSES, COURSE DEVELOPMENT AND TEST ADMINISTRATION.....	7
SIN 874-7: PROGRAM AND PROJECT MANAGEMENT SERVICES.....	8
INSTRUCTIONS FOR PLACING ORDERS FOR SERVICES BASED ON GSA SCHEDULE HOURLY RATES	8
REQUIREMENTS EXCEEDING THE MAXIMUM ORDER (I-FSS-125).....	9
BLANKET PURCHASE AGREEMENT (8.405-3)	9
MOBIS RATES/CONTRACT NO. GS-02F-0110X	11
LABOR CATEGORY DESCRIPTIONS.....	13
EDUCATIONAL REQUIREMENTS: MASTER’S DEGREE	13
MINIMUM EDUCATIONAL REQUIREMENTS: MASTER’S DEGREE OR EQUIVALENT.	16
EXPERIENCE & DEGREE SUBSTITUTION	17
DEGREE/EXPERIENCE EQUIVALENCY*	17



Advantage![®]
www.gsaadvantage.gov



Innovation Partners, LLC

General Contract Information

1. Special Item Numbers:

874-1: Consulting Services

874-3: Survey Services

874-4: Please see the attached.

874-7: Program and Project Management Services

b. Lowest Priced Model Number and Lowest Price:

Please refer to our rates on page 11

c. Labor Category Descriptions:

Please refer to our rates on page 13

2. Maximum Order: \$1,000,000 per SIN, however orders above maximum are permitted.

3. Minimum Order: \$300 per SIN

4. Geographic Coverage: Worldwide

5. Point(s) of Production (City, County, and State or Foreign Country):

Innovation Partners, LLC.
2423 Plantation Center Drive
Suite A
Matthews, NC 28105

6. Discount From List Price: Prices as stated are net prices.

7. Quantity Discounts: Not applicable

8. Prompt Payment Terms: Net 30 days

9. Government Purchase Card:

a. **IS** accepted at or below the micropurchase threshold.

b. **IS** accepted above the micropurchase threshold.

10. Foreign Items: None

11. a. Time of Delivery: To be negotiated with ordering agency.

b. **Expedited Delivery:** To be negotiated with ordering agency.

c. **Overnight and 2-Day Delivery:** To be negotiated with ordering agency.

d. **Urgent Requirements:** To be negotiated with ordering agency.

12. F.O.B. Point(s): Destination



Advantage![®]
www.gsaadvantage.gov



Innovation Partners, LLC

13. a. **Ordering Address:** Innovation Partners LLC
Attn: Patrick Sutherland
P.O. Box 1300
Matthews, NC 28106
- b. **Ordering Procedures:** For supplies and services, the ordering procedures information on Blanket Purchase Agreements ("BPAs") and a sample BPA are found in Federal Acquisition Regulation (FAR) 8.405-3.
14. **Payment address(es):** Innovation Partners LLC
Attn: Accounts Receivable
P.O. Box 1300
Matthews, NC 28106-1300
15. **Warranty provision:** Standard Commercial Warranty
16. **Export Packing Charge:** N/A
17. **Terms and Conditions of Government Purchase Card Acceptance:** Contact Contract Administrator.
18. **Terms & Conditions of Rental, Maintenance & Repair:** N/A
19. **Terms & Conditions of Installation:** N/A
20. **Terms & Conditions of Repair Parts Incl. Date, etc.** N/A
- a. **Terms & Conditions of Any Other Services:** N/A
21. **List of Service & Distribution Points:** N/A
22. **List of Participating Dealers:** N/A
23. **Preventive Maintenance:** N/A
24. a. **Special Attributes Such as Environmental Attributes:** N/A
- b. **Section 508 Compliance Information is available:** Contract Administrator for more information.
25. **Data Universal Number System (DUNS):** 022880164
26. **Notification Regarding Registration in Central Contractor Registration (CCR) Database:** Yes, registered annually.
27. **Uncompensated Overtime:** Innovation Partners, LLC practices uncompensated overtime.

Innovation Partners, LLC Overview

Innovation Partners, LLC (IPLLC), is an actuarial and management consulting firm that is registered with the SEC, FINRA and the SIPC. Our firm provides high value risk management, actuarial analysis, benefits consulting, financial consulting, management consulting, insurance consulting, and investment advisory services to clients throughout the United States. We consult to a large number of local and multinational clients, such as insurance companies, re-insurers, banks, fund managers, broker dealers, regulatory bodies, government agencies and retail organizations.

Our multi-disciplined approach to management and consulting permits us to serve our clients in a broader and more complete fashion than is possible by any traditional firm. Our team is composed of actuaries, investment professionals, attorneys and other experts – all of whom have years of experience in the financial services and other industries. Our principals and key thought leaders have over 100 years of combined financial and corporate experience.

Understanding the Business of Government

We understand how the Federal Government works from a business perspective. Our understanding of how the Federal Government works, together with our extensive skills and capabilities, will allow us to assist you in implementing successful financial and business improvement programs in support of your agency's goals and objectives. In addition to bringing a remarkable breadth of resources to bear on any area of operations, IPLLC is also proud of its time-tested approach to engagement management. IPLLC has executed hundreds of engagements that have been delivered on time and with "no surprises".

Innovation in Training

Serving both the public and private sectors, IPLLC is able to utilize "the best of both worlds" experience to create solutions uniquely suited to your business needs. This uniqueness of thinking also comes through in our training solutions. While taking advantage of the latest technology in training and education, our instructors are "in-the-field" professionals who teach principles and skills based on real-world experience. Our goal is to provide education that will teach students "hands-on" skills that they can use today, while giving them a strong knowledge base of technology trends toward the future. This will allow them to be more prepared for those changes, and to make a smooth transition as they occur.

Contract Use

This contract is available for use by all federal government agencies, as a source for Mission Oriented Business Integrated Services. Executive agencies, other federal agencies, mixed-ownership government corporations, and the District of Columbia, government contractors authorized in writing by a federal agency pursuant to 48 CFR 51.1, and other activities and organizations authorized by statute or regulation to use GSA as a source of supply may use this contract. Additionally, contractors are encouraged to accept orders received from activities within the Executive Branch of the Federal Government.

Contract Scope

Services specified in a task order may be performed at the contractor's facilities or the ordering agencies' facilities. The government will determine the contractor's compensation by any of several different methods to be specified at the task order level (e.g., a firm-fixed price for services with or without incentives), labor hours or time-and-material.

The Special Item Numbers (SINs) available under this contract provide services across the full life cycle of a project. When task orders are placed they must identify the SIN or SINs under which the task is being executed. IPLLC has been awarded a contract by GSA to provide services under the following SINs:

874-1	Consulting Services
874-3	Survey Services
874-4	Training Services including: instructor-led training, web-based training, educational courses, courses development and testing
874-7	Program and Project Management Services

A full description of each SIN definition and examples of the types of work covered by the SIN are provided below.

SPECIAL ITEM NUMBER (SIN) DESCRIPTIONS

SIN 874-1: CONSULTING SERVICES

Contractors shall provide expert advice, assistance, guidance or counseling in support of an agency's mission-oriented business functions. Services covered by this SIN are:

- Management or strategy consulting
- Program planning, audits, and evaluations
- Studies, analyses, scenarios, and reports relating to an agency's mission-oriented business programs or initiatives, such as defense studies, tabletop exercises or scenario simulations, educational studies, regulatory or policy studies, health care studies, economic studies, and preparedness studies
- Executive/management coaching services
- Customized business training as needed to successfully perform/complete a consulting engagement
- Policy and regulation development assistance
- Expert Witness services in support of litigation, claims, or other formal cases
- Advisory and assistance services in accordance with FAR 37.203

Financial audits are covered under GSA Schedule 520, Financial and Business Services, and are not allowed under this SIN. The term "consulting" as defined herein does not include staff augmentation.

NOTE: Expert witness services pertaining to financial matters are not covered under this SIN. Refer to Schedule 520, SIN 520-6, Professional Legal Services. Consulting services relating to public relations are not covered under this SIN. Refer to Schedule 541, SIN 541-2, Public Relations Services. Legal services are not covered under this SIN.

SIN 874-3: SURVEY SERVICES

Contractors shall provide surveying relating to mission-oriented business issues. Contractors shall assist with or perform

all phases of the survey process. Services covered by this SIN are:

- Survey planning, design, and development
- Pretest/pilot surveying
- Assessing reliability and validity of data
- Conducting/administering surveys
- Analyses of quantitative and qualitative survey data
- Production of reports related to the survey
- Briefings of results to stakeholders

Any surveys relating to condition or status of equipment or property, or Architect and Engineering services as defined in FAR 36.601-4, are prohibited under MOBIS.

SIN 874-4 Training Services: Instructor-Led Training, Web-Based Training, Educational Courses, Course Development and Test Administration.

IPLLC offers the full range of course development and testing administration services needed by government agencies to improve agency mission performance and support federal clients' goals now and in the future. Our services span the full training lifecycle represented by Special Item Number (SIN) 874-4.

IPLLC's approach to course development begins with a process of front-end analysis that provides a comprehensive evaluation of the client's training needs. We determine the learning objectives for which training strategies and methods are developed.

Services include the following:

- Enterprise-wide Risk Management
- Financial Planning
- Asset/Liability Management
- Retirement Planning for Federal Employees
- Insurance and Captive Planning
- Reverse Mortgage Training
- FHA and Conventional Mortgage Training
- Understanding Federal Benefits for Human Resource Practices
- Derivatives and Other Investment Training
- Data Modeling/Analysis Services
- Models/Database Development and Application
- Object-oriented Design
- Visual Basic Training
- SQL Server Training
- Java Training and C+ Programming

- Graphic/Web Design Training
- Desktop Publishing Training
- Microsoft Application Training
- QuickBooks Training

SIN 874-7: PROGRAM AND PROJECT MANAGEMENT SERVICES

Contractors shall provide services to assist agencies in planning, initiating, managing, executing, and closing out mission-oriented business programs and projects. Services included are:

- Project leadership and communications with stakeholders
- Project planning and scheduling
- Earned value management support
- Project management, including performance monitoring and measurement
- Reporting and documentation associated with project/program objectives
- Stakeholder briefings, participation in required meetings, and related project support services
- Program integration services
- Project close-out services

All services must be provided and performed under the supervision/management of the contractor's Project Manager or Program Manager. Orders for services under this SIN without an accompanying Program/Project Manager Labor Category are prohibited.

The primary purpose and preponderance of work for any project awarded under this SIN must be for professional business services. Services covered by other GSA Schedules shall only be included in the project scope if they are directly related to the successful accomplishment of the project and are incidental to the overall effort. It is the responsibility of the Contracting Officer placing the order to make this determination.

INSTRUCTIONS FOR PLACING ORDERS FOR SERVICES BASED ON GSA SCHEDULE HOURLY RATES

GSA provides a streamlined, efficient process for ordering the services you need. GSA has already determined that Innovation Partners, LLC. meets the technical requirements and that our prices offered are fair and reasonable. Agencies may use written orders, facsimile orders, credit card orders, blanket purchase agreement orders or individual purchase orders under this contract.

If it is determined that your agency needs an outside source to provide MOBIS services, follow these simple steps:

Step 1. Develop a Statement of Work (SOW)

In the SOW, include the following information:

- Work to be performed
- Location of work
- Period of performance



Advantage![®]
www.gsaadvantage.gov



Innovation Partners, LLC

- Deliverable schedule
- Special standards and any special requirements, where applicable

Step 2. Select Contractor and Place Order

If the order is at or below the micro-purchase threshold, select the contractor best suited for your needs and place the order.

- If the order is exceeding but less than the maximum order threshold (MOT), prepare an RFQ.
- If the order is in excess of the MOT, prepare an RFQ. Consider expansion of competition and seek price reductions.

Step 3. Prepare a Request for Quote (RFQ)

- Include the SOW and evaluation criteria.
- Request fixed price, ceiling price, or, if not possible, labor hour or time and materials order.
- If preferred, request a performance plan from contractors and information on past experience. Include information on the basis for selection.
- May be posted on GSA's electronic RFQ system, e-Buy.

Step 4. Provide RFQ to at least Three Firms

Step 5. Evaluate Offers, Select Best Value Firm, and Place Order

REQUIREMENTS EXCEEDING THE MAXIMUM ORDER (I-FSS-125)

In accordance with FAR 8.404, before placing an order that exceeds the maximum order threshold, ordering offices shall:

- Review additional schedule contractors' catalogs/price lists or use the "GSA Advantage!" on-line shopping service;
- Based upon the initial evaluation, generally seek price reductions from the schedule contractor(s) appearing to provide the best value (considering price and other factors); and
- After price reductions have been sought, place the order with the schedule contractor that provides the best value and results in the lowest overall cost alternative (see FAR 8.404(a)). If further price reductions are not offered, an order may still be placed, if the ordering office determines that it is appropriate.

Vendors may:

- Offer a new lower price for this requirement (the Price Reduction clause is not applicable to orders placed over the maximum order in FAR 52.216-19 Order Limitations.);
- Offer the lowest price available under the contract; or
- Decline the order (orders must be returned in accordance with FAR 52.216-19).

A task order that exceeds the maximum order may be placed with the Contractor selected in accordance with FAR 8.404. The order will be placed under the contract.

Sales for orders that exceed the Maximum Order shall be reported in accordance with GSAR 552.238-74.

BLANKET PURCHASE AGREEMENT (8.405-3)

Ordering activities may establish BPAs under any schedule contract to fill repetitive needs for supplies or services. BPAs may be established with one or more schedule contractors. The number of BPAs to be established is within the discretion of the ordering activity establishing the BPAs and should be based on a strategy that is expected to maximize the effectiveness of the BPA(s). In determining how many BPAs to establish, consider:

- The scope and complexity of the requirement(s);
- The need to periodically compare multiple technical approaches or prices;
- The administrative costs of BPAs; and
- The technical qualifications of the schedule contractor(s).

Establishment of a single BPA, or multiple BPAs, shall be made using the same procedures outlined in 8.405-1 or 8.405-2. BPAs shall address the frequency of ordering, invoicing, discounts, requirements (e.g. estimated quantities, work to be performed), delivery locations, and time.

When establishing multiple BPAs, the ordering activity shall specify the procedures for placing orders under the BPAs.

Establishment of a multi-agency BPA against a Federal Supply Schedule contract is permitted if the multi-agency BPA identifies the participating agencies and their estimated requirements at the time the BPA is established.

Ordering from BPAs:

Single BPA. If the ordering activity establishes one BPA, authorized users may place the order directly under the established BPA when the need for the supply or service arises.

Multiple BPAs. If the ordering activity establishes multiple BPAs, before placing an order exceeding the micro-purchase threshold, the ordering activity shall:

- Forward the requirement, or statement of work and the evaluation criteria, to an appropriate number of BPA holders, as established in the BPA ordering procedures; and
- Evaluate the responses received, make a best value determination (see 8.404(d)), and place the order with the BPA holder that represents the best value.

BPAs for hourly rate services. If the BPA is for hourly rate services, the ordering activity shall develop a statement of work for requirements covered by the BPA. All orders under the BPA shall specify a price for the performance of the tasks identified in the statement of work.

Duration of BPAs. BPAs generally should not exceed five years in length, but may do so to meet program requirements. Contractors may be awarded BPAs that extend beyond the current term of their GSA Schedule contract, so long as there are option periods in their GSA Schedule contract that, if exercised, will cover the BPA's period of performance.

Review of BPAs:

The ordering activity that established the BPA shall review it at least once a year to determine whether:

- The schedule contract, upon which the BPA was established, is still in effect;
- The BPA still represents the best value (see 8.404(d)); and
- Estimated quantities/amounts have been exceeded and additional price reductions can be obtained.

The ordering activity shall document the results of its review.



Advantage![®]
www.gsaadvantage.gov



Innovation Partners, LLC

MOBIS Rates/Contract No. GS-02F-0110X

The following categories are offered at the prices indicated:

MOBIS Rates starting March 24, 2011 through March 23, 2016	
SIN 874-1, 874-3, 874-4, 874-7	
Labor Category	3/24/2011 through 3/23/2012
Senior Practice Leader	\$386.46
Practice Leader	\$340.45
Senior Consultant	\$259.16
Project Manager	\$89.84
Administrative Assistant	\$42.56
Sr. Specialist Technical Team Leader	\$195.50
Programmer Analyst	\$113.67
Database Administrator	\$159.13
Senior Subject Matter Expert	\$503.96
Senior Managing Consultant II	\$495.34
Senior Managing Consultant I	\$473.80
Managing Consultant III	\$443.65
Managing Consultant II	\$409.19
Managing Consultant I	\$387.66
Expert Financial Modeler	\$320.76
National Expert Actuary	\$353.04
Expert Actuary I	\$317.81
Senior Actuary I	\$249.15
Expert Researcher I	\$279.83
Expert Researcher II	\$270.37



GSA SCHEDULE CONTRACT PRICING SIN 874-4

Course Title	Length	Price*	Participant Min/Max
Interviewing Skills/Human Resources	1 day	\$3,542.00	8/18
Financial Literacy/Budgeting	1 day	\$3,924.00	8/18
Risk Management	2 days	\$6,317.00	10/20

*Price Fixed regardless of # of participants. No less than and no greater than participant minimum/maximum.

Schedule Title: Training Aids and Devices; Instructor-Led Training; Course Development & Test Administration					
1a. Table of special item number(s) with appropriate cross-reference to item descriptions and awarded price(s):					
SIN	SEMINAR GSA	COMMERCIAL PRICE	PROPOSED GSA PRICE DISCOUNT	PROPOSED GSA PRICE WITH IFF	GSA Discount
	Federal Pre-Retirement Planning: One-day course (Agency hosted and includes up to 40 attendees) Additional fee per person for more than 40 registrants	\$2,500 \$80.00 per person	\$1,900 \$80.00 per person	\$1,900 \$80.00 per person	24%
	Federal Pre-Retirement Planning: Two-day course (Agency hosted and includes up to 40 attendees) Additional fee per person for more than 40 registrants	\$5,000 \$80.00 per person	\$3,800 \$80.00 per person	\$3,800 \$80.00 per person	24%
	Federal Pre-Retirement Planning: Three-day course (Agency hosted and includes up to 40 attendees) Additional fee per person for more than 40 registrants	\$7,000 \$80.00 per person	\$5,225 \$80.00 per person	\$5,225 \$80.00 per person	25.35%
	Training Manual	\$10 per manual	\$10 per manual	\$9 per manual	10%
NOTE: Instructor fees, course materials and handouts/manuals for a class of 40 participants are included in the per course price. Spouses may attend for free.					

LABOR CATEGORY DESCRIPTIONS

Senior Practice Leader

Functional Description: Manages the development of large program initiatives, provides client solutions and insures state of the art practices. Thought Leader.

General Experience Requirements: 10+ years' experience. Extensive knowledge in related task.

Educational Requirements: Ph.D. or degree in related field.

Practice Leader

Functional Description: Manages the development of program initiatives, including job analyses and program material development. Validates and implements programs, including program maintenance.

General Experience Requirements: 7+ years' consulting experience. Extensive knowledge in related task.

Educational Requirements: Ph.D. or degree in related field.

Senior Consultant

Functional Description: Conducts job analyses, including SME interviews. Creates and analyzes data from analysis questionnaires. Develops competency models. Evaluates guidelines, role-play scenarios, survey tools, and training content. Validates and implements programs. Conducts studies in areas of specialized expertise.

General Experience Requirements: 5+ years' consulting experience. Extensive knowledge in related task.

Educational Requirements: Ph.D. or degree in related field.

Project Manager

Functional Description: Plans and coordinates delivery of performance improvement services. Oversees scheduling, materials production and distribution, and on-site logistics.

General Experience Requirements: Experience in human resources, operations and customer service or project.

Educational Requirements: Bachelor's degree.

Administrative Assistant

Functional Description: Provides administrative support on a given client project and other administrative duties as needed.

General Experience Requirements: Two years' administrative experience, preferably HR experience.

Educational Requirements: Associate's degree.

Sr. Specialist Technical Team Leader

Functional Description: Plays a key role in driving forward technology initiatives. Assists in development of project plans. Provides technical assistance. Analyzes client needs and development specifications. Oversees debugging and testing. Establishes and maintains project development specifications and standards.

General Experience Requirements: Experienced in leading a development team in implementing and deploying enterprise software solutions. Strong knowledge of programming, design and testing of software applications.

Educational Requirements: Master's degree

Programmer Analyst

Functional Description: Coordinates programming projects. Writes, tests, debugs programs. Assists in developing solutions to software-related and programming problems. Supports overall applications development.

General Experience Requirements: 2-4 years' programming experience, including knowledge of HR Outsourcing computer applications, IT methods and equipment.

Educational Requirements: Bachelor's degree.

Database Administrator

Functional Description: Configures databases for web applications. Performs database administration activities including backup and recovery. Maintains development and test environment databases. Designs, implements and optimizes database systems in an NT environment.

General Experience Requirements: 3+ years of demonstrated experience administering SQL Server DBA.

Educational Requirements: Bachelor's degree in Computer Science.

Senior Subject Matter Expert

Functional Description: Senior expert with extensive, enterprise-wide knowledge and experience in one or more designated functional discipline areas. Provides insight and advice concerning strategic direction and ensures project objectives are delivered in the context of industry best practices. Is responsible for providing high-level vision to senior client leadership to influence objectives of complex efforts. The Senior Subject Matter Expert is primarily utilized on projects for their specific expertise, not in a managerial capacity.

General Experience Requirements: Generally over 20 years of significant experience in multiple disciplines across a broad range of clients. Held consulting or leadership positions in major private or public organizations with experience in assessing and designing organizational strategies, processes, systems, or plans to improve organizational performance in broad or specific functional areas.

Educational Requirements: Minimum of a Ph.D. May hold graduate degrees/qualifications/credentials in economics, finance, investments, actuarial science, employee benefits, risk management, law, organizational development, or other business-related specialties.

Senior Managing Consultant II

Functional Description: Drives content and provides thought leadership. Generates innovative approaches to address business problems. Manages execution of comprehensive business-centric efforts, while balancing potentially conflicting themes and objectives. Develops new knowledge and capabilities derived from a broad range of cross industry/functional experiences. Directs the completion of work by engagement teams and provides primary client interface on strategic issues.

General Experience Requirements: Generally over 15 years of extensive multi-client/industry experience. Specialist in multiple functional/industry disciplines. Demonstrated leadership of consulting engagements in assessing and designing organizational strategies, processes, systems, or plans to improve organizational performance in broad or specific functional areas.

Educational Requirements: Minimum of a Ph.D. May hold graduate degrees/qualifications/credentials in economics, finance, investments, actuarial science, employee benefits, risk management, law, organizational development, or other business-related specialties.

Senior Managing Consultant I

Functional Description: Drives content and provides thought leadership. Generates innovative approaches to address business problems. Manages execution of comprehensive business-centric efforts, while balancing potentially conflicting themes and objectives. Develops new knowledge and capabilities derived from a broad range of cross industry/functional experiences. Directs the completion of work by engagement teams.

General Experience Requirements: Generally over 12 years of extensive multi-client/industry experience. Specialist in at least one functional/industry discipline with experience in assessing and designing organizational strategies, processes, systems, or plans to improve organizational performance in broad or specific functional areas.

Educational Requirements: Minimum of a Master's Degree. May hold graduate degrees/qualifications/credentials in economics, finance, investments, actuarial science, employee benefits, risk management, law, organizational development, or other business-related specialties.

Managing Consultant III

Functional Description: Provides oversight and senior level management to overall contract operations often involving multiple projects/tasks and groups of personnel at multiple locations. Maintains and manages relationships with senior level management within the client organization. Leads defining of project objectives and strategic direction for the stated business operations. Manages multiple contract operations and ensures quality standards and work performance on all task orders and projects. Plans, organizes and oversees work efforts, assigns resources, manages personnel, provides risk management, and monitors overall project and contract performance.

General Experience Requirements: Generally over 12 years of extensive multi-client/industry experience. Specialist in at least one functional/industry discipline with experience in assessing and designing organizational strategies, processes, systems, or plans to improve organizational performance in broad or specific functional areas.

Educational Requirements: Minimum of a Master's Degree. May hold graduate degrees/qualifications/credentials in economics, finance, investments, actuarial science, employee benefits, risk management, law, organizational development, or other business-related specialties.

Managing Consultant II

Functional Description: Performs the day-to-day management of contract support operations, possibly involving multiple tasks and groups of personnel at multiple locations, on a single project. Manages defining of project objectives and strategic direction for the stated business operations. Evaluates options in the context of project objectives and contributes to the implementation of strategic direction. Directs the activities of Consultants or other staff as necessary.

General Experience Requirements: Generally over 10 years of broad multi-client/industry experience; Specialist in at least one functional/industry discipline with experience in assessing and designing organizational strategies, processes, systems, or plans to improve organizational performance in broad or specific functional areas.

Educational Requirements: Minimum of a Master's Degree. May hold graduate degrees/qualifications/credentials in economics, finance, investments, actuarial science, employee benefits, risk management, law, organizational development, or other business-related specialties.

Managing Consultant I



Advantage![®]
www.gsaadvantage.gov



Innovation Partners, LLC

Functional Description: Defines project objectives and strategic direction for the stated business operations. Responsible for providing leadership and vision to client and project teams and serves as a key facilitator between multiple teams to achieve objectives of complex efforts. Directs the activities of more junior consultants or other staff as necessary.

General Experience Requirements: Generally over 8 years of multi-client/industry experience. Specialist in at least one functional/industry discipline with experience in assessing and designing organizational strategies, processes, systems, or plans to improve organizational performance in broad or specific functional areas.

Educational Requirements: Minimum of a Master's Degree. May hold graduate degrees/qualifications/credentials in economics, finance, investments, actuarial science, employee benefits, risk management, law, organizational development, or other business-related specialties.

Expert Financial Modeler

Functional Responsibilities: Finance or micro simulation modeler and team leader with extensive interaction with clients. Recognized as an expert in financial modeling. Publishes in technical journals or makes presentations to technical organizations.

Minimum Experience: 20 years' experience.

Minimum Educational Requirements: Master's degree or equivalent.

National Expert Actuary

Functional Responsibilities: Actuary with extensive specialized experience and recognized as an expert in actuarial matters. Provides articles for technical organizations, serves on actuarial committees, or authors technical books. Team leader with extensive interaction with clients.

Minimum Experience: 18 years' experience.

Minimum Educational Requirements: FSA or equivalent.

Expert Actuary I

Functional Responsibilities: Actuary with extensive specialized experience and recognized as an expert in actuarial matters. Serves on actuarial committees or makes presentations to actuarial organizations. Team leader with extensive interaction with clients.

Minimum Experience: 18 years' experience.

Minimum Educational Requirements: FSA or equivalent.

Senior Actuary I

Functional Responsibilities: Actuary and team leader with substantial client contacts. Provides actuarial contributions to projects or professional literature. Participation in national professional actuarial meetings.

Minimum Experience: 10 years' experience.

Educational Requirements: FSA or equivalent.

Expert Researcher I

Functional Responsibilities: Health services researcher and team leader with extensive interaction with clients. Provides health policy

advice on a national and state level, and is recognized as a health services research expert. Publishes in technical literature or participates in health service forums.

Minimum Experience: 14 years' experience.

Minimum Educational Requirements: Master's or equivalent.

Expert Researcher II

Functional Responsibilities: Health services researcher and team leader with extensive interaction with clients. Provides health policy advice on a national and state level, and is recognized as a health services research expert. Publishes in technical literature or participates in health service forums.

Minimum Experience: 12 years' experience.

Minimum Educational Requirements: Master's or equivalent.

EXPERIENCE & DEGREE SUBSTITUTION

The above describes the functional responsibilities and education and experience requirements for each labor category. These requirements are a guide to the types of experience and educational background of typical personnel in each labor category.

Education and experience may be substituted for each other. Each year of relevant experience may be substituted for one year of education, and vice versa. In addition, certifications, professional credentials, and vocational technical training may be substituted for experience or education.

Degree/Experience Equivalency*

Degree	Experience Equivalence	Other Equivalence
Bachelor	Associate's degree + 2 years' relevant experience, or 4 years' relevant experience	Professional certification and vocational technical training
Master	Bachelor's degree + 2 years' relevant or Associate's + 4 years' relevant experience	Professional credentials
Doctorate	Master's degree + 4 years' relevant or Bachelor's + 6 years' relevant experience	Professional credentials

Certifications, Training, and Credentials	Experience Equivalence
Professional Exams	1 year experience for every 2 years passed
Professional certification and vocational technical training	3 years experience
Professional credentials	6 years experience

*Successful completion of higher education which has not yet resulted in a degree may be counted as 1 year of experience for each year of college completed.